

# Custom Doc Rules

Set automation rules to control your workflow.

Making sure you send the right documents at the right time on all your jobs is complicated and time consuming. Simplify your process with Doc Rules. Design custom workflows to prioritize suggested actions, automatically send documents, and more. You have full control so you can cover all your company's needs.

## Prioritize Actions

Create Doc Rules to prioritize the actions you care about most and bring them to the top of your Queue. Set Doc Rules to determine what goes into your Queue, when it goes into your Queue, how long it remains in your Queue, and how Levelset processes it.

From your Queue, you can see a list of prioritized actions and can easily approve, cancel, or snooze key documents. This is particularly useful when you have a high volume of jobs.

### PRIORITIZE ACTIONS BASED ON:

- Outstanding dollar amount
- AR Data (how far past due)
- AP Data
- State
- Branch
- Line of Business
- Contract Value
- Job Type
- And more

### Project Tracking

Projects	Project Type	Next Deadline Info	Amount Due	Hiring Party	
Southwest Extension 346 Palm St. Austin TX	Commercial	Preliminary Notice Due in 23 days <span style="background-color: yellow; border: 1px solid black; padding: 2px;">Required</span>	\$3,300	General Contractor	<a href="#" style="background-color: #28a745; color: white; padding: 5px; border-radius: 5px;">View</a>
Residence Restoration 3412 Canal Ln Metairie, LA	Residential	Notice of Intent to Lien Due in 6 days	\$6,450	Subcontractor	<a href="#" style="background-color: #28a745; color: white; padding: 5px; border-radius: 5px;">View</a>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**Deadlines**

**Upcoming**

**Preliminary Notice**

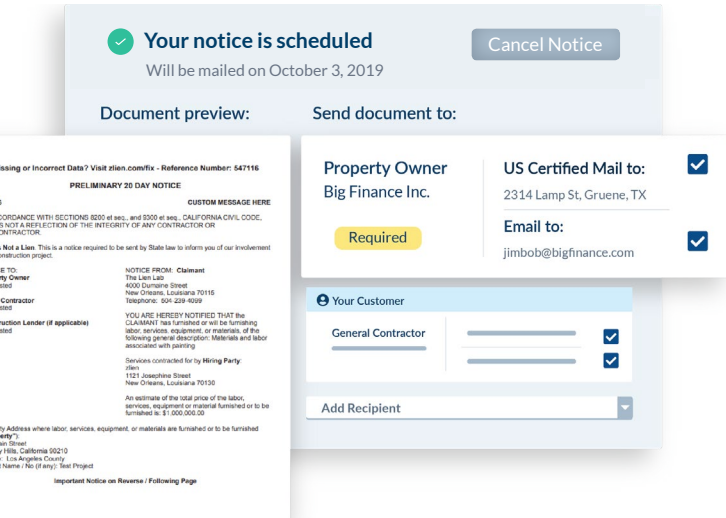
First day on the job

2019/02/18

**Due in 11 days**

**Send Notice**

[Dismiss Deadline](#)



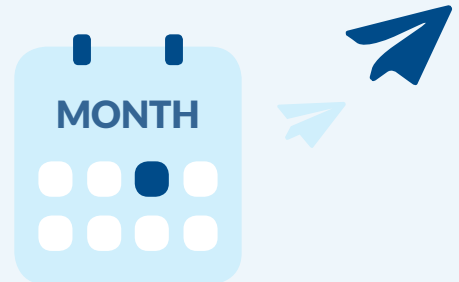
## Automation

You can also use Doc Rules to automate actions and set preferences to save time while staying in control:

- ✓ **High Automation:** Notices are automatically prepared and sent based on your preferences.
- ✓ **Some Automation:** Prioritized actions are suggested but you have the option to dismiss actions before the document is prepared and sent.
- ✓ **Low Automation:** Actions are suggested but documents won't be sent unless you approve them in your Queue.

## Monthly Notice Control

Levelset's Monthly Notice Control makes it easy to manage monthly notice requirements in states like Texas, Tennessee, Louisiana, and New Hampshire. Levelset will prepare all your monthly notices based on unpaid invoices, but won't send them until the day they're due so you have time to cancel them if you get paid at the last minute.



**1**

### SYNC INVOICES

Connect invoices and AR data to Levelset.

**2**

### LEVELSET PREPARES NOTICES

Levelset prepares all your notices early so they're ready to go. You can cancel them at any time if you get paid.

**3**

### NOTICES ARE SENT

At 10am on the deadline day Levelset sends all the monthly notices in your Queue.